



# OFFICER TRANSITION CHECKLIST

Officer: \_\_\_\_\_ Position: \_\_\_\_\_

Continuity is vital when transitioning officers. This document serves as a guide for transitioning your role to the incoming officer. It's important that you take the necessary time to get to know one another, exchange contact information, and walk through the key responsibilities of the position. If you do this correctly, the progress you've made during your tenure will be a foundational building block for the next officer.

Use the checklist below to provide all necessary information to the incoming officer. You should organize all of the appropriate documentation for your position into a Google Drive, Dropbox, or some other online location and provide access to your successor. We also encourage you to point your successor to the FarmHouse Fraternity website, click on 'Resources', select 'Officers and Advisors', and choose the appropriate position. They will find a series of helpful documents and resources.

## Checklist of Tasks

- Setup a time to meet with your successor at least once
- Provide a copy of your position description
- Include a copy of your allocated budget
- Organize physical and digital copies of the key documents pertaining to your role
- Create a spreadsheet of important contacts for the role (campus, HQ, local orgs., etc.)
- Consider introducing him in person or over email to the important contacts
- For any unfinished projects, document your progress and highlight remaining tasks

A big part of transitioning your role is sharing your wisdom and experience beyond physical documentation. When you meet with your successor, consider discussing:

- Your biggest accomplishments
- What you learned in the role
- Mistakes for the other person to avoid
- The other people/roles in the chapter that are most important to their success
- Your vision for the position long-term
- How you can be a resource for the new officer